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Column Title: Perspectives on Public Services

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This column examines advances in public services internal and external to libraries. The focus is on how public services, such as instruction and education, programming, research consulting, and circulation, evolve and impact users. The strength of the column is its broad, international focus and contributors are encouraged to explore issues and recent advances in public services relevant to their geographical region, as well as the larger, global audience. Interested authors are invited to submit proposals and articles to the column editor at falconea1@nku.edu.

Rethinking the Role of Circulation Staff in Academic Libraries

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Abstract:

The traditional functions of Access Services shrink as many academic libraries see physical circulation rates continue to decline, but the need for staff trained in customer service skills does not diminish. This column reflects on how one academic Access Services department partnered internally with other library departments to expand our definitions of who we serve and find new ways to prove our value to the library. Other academic libraries may find inspiration to rethink old habits, forge new connections, and determine what success looks like.

Keywords:

Access Services; Organizational Change; Interdepartmental Collaboration; Customer Services; Library Personnel

Introduction:

In 2016, with eagerness but also some trepidation, I took the opportunity to transition from a Web Services and Research & Instruction Librarian position into a new role heading up the Access Services department and launching a fledgling scholarly communication service. In addition to this being my first foray into management, it was also my first exposure to “the other side” of public services at a Circulation Desk rather than a Reference Desk. Over the past five years, I have learned so much from my staff, and, I hope, I have helped to broaden our collective

sense of what Access Services can be. This column will reflect on our process of rethinking Access Services in terms of evolving roles and demonstrating value to the library.

Local Context

Newton Gresham Library is the sole library on the main campus of Sam Houston State University (SHSU), a mid-sized public university with a Carnegie classification of Doctoral/Professional University and serving a student population of approximately 21,500 students. A former Normal School, SHSU maintains a strong focus on teaching excellence and, in particular, has a reputation for supporting first-generation college students. The library employs 20 professional librarians, 26 paraprofessional staff, and nearly 50 student workers at any given time. When I joined the Access Services department, I was the sole librarian along with five full-time and one half-time staff members, and approximately 20 student workers. The team was responsible for traditional core responsibilities, including circulation, reserves, stacks maintenance, and billing, all of which were declining in workload with the exception of electronic reserves.

Historically, our Access Services department had been led with compassion and consistency, but it had not necessarily adapted to reflect new service trends or the changing importance of technology. Decades ago, the library faced problems with unreliable email storage, spotty internet service, and occasional power outages caused by lines cut during highway construction. These problems, coupled with the fact that it was familiar as “what was always done,” led the department to rely heavily on the paper paradigm. Emails sent to patrons were printed and filed as backup copies. Reserves request forms and documents posted in electronic reserves were also kept filed in paper form. Suffice to say, the staff was well prepared to reference any information during a loss of connectivity, but those problems have become infrequent; meanwhile these practices were requiring filing time, generating storage space concerns, and running counter to campus initiatives to create a culture and practices of sustainability. Additionally, some manual paper-based procedures created significant space for user error and actual loss of records. For example, when the integrated library system experienced an outage, numbers for book barcodes and patron IDs were recorded by hand on yellow pads and later typed into the ILS, creating multiple opportunities for mistakes in manual entry, rather than being scanned into Excel for later copying into the ILS.

Our department was also stymied by barriers, whether internally or externally imposed, to what Circulation staff “could” do. Reference and Circulation had always operated in separate spaces, both physically and mentally, and an attitude of “don’t step on toes” permeated all interactions. Could Reference check out books? Technically, yes, but that was “Circulation’s job.” Could Circulation answer mid-level reference questions? Probably so, but that was “Reference’s turf.” People were entrenched in their ideas of what their job did or did not include, whether those limitations were real or imagined.

But other realities emerged that we could not ignore. Physical circulation has continued to decline as electronic resources increase. Routine tasks have become increasingly automated and efficient, and processes like manually stamping due dates are considered obsolete. We have

found that we need a certain number of employees to cover public service areas during the library's hours of operation, but more than ever we are struggling to provide those individuals with meaningful work in between their patron interactions. Something needed to change.

Reframing

This formed the background for us to rethink our mission, procedures, and relationships. Over the course of several staff meetings, as well as department-level work during a library-wide mission and vision workshop, we framed our identity as customer service specialists, but emphasized that we had customers both inside and outside the library. We wanted to find new ways to use our existing skills, and develop new ones, in order to better support the end goal of *access*, no matter where in the library that work took place. Our mission and vision statement asserted:

We are the customer service-oriented, problem-solving, face of the library. We seek to continuously improve the user experience, improve access, put our best face forward, and provide the best service possible to both internal and external constituents while maintaining usability and fairness.

Much of the following process was not exactly linear, with different pieces emerging and coalescing at different points in time, but for the purposes of this column, I will attempt to distill it into more or less a linear series of components. A foundational step was to rethink our way of doing business. I felt we could not confidently take on new roles until we streamlined our existing roles. Paper-based duplicate records were almost uniformly eliminated, except with concerns to billing, where university accounting required a certain amount of documentation. Due-date stamping ceased. Substantially more record-keeping shifted into Excel or the LibApps suite from Springshare. Logical new services were introduced to leverage existing technology for patron benefit—such as offering online study room reservations, rather than relying on first-come/first-served checkout.

Discussion with other library department heads was the next paramount piece of the iterative process. Where did their departments need help, or where could we identify inefficient workflows that Access Services could perhaps support? The obvious place for me to start was with myself: In addition to heading Access Services, I am also the Scholarly Communications Librarian. I lead a “team” of one in this capacity, so I set about thinking how I could recruit my own Access Services staff in new ways. I had, in support of our Digital Resources Librarian, already begun a large project to proactively review faculty CVs campus-wide and identify scholarly publications which could be added to our institutional repository. Thus two staff members from Access Services were trained to comb through CVs, pull out published article citations, and search the Sherpa Romeo database of journal self-archival policies to gather any pre-existing information about how journals allowed publications to be deposited. The staff were eager and excited to take on this new responsibility, especially since our training illustrated the broad impact this work would have on improving visibility and access for our campus' research outputs. Although I still reviewed all records to interpret the policy data and make the final judgement, and publications not included in Sherpa Romeo still required me to conduct more

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specialized research, involving staff took more than half the labor off my plate, and that first stage of the project was completed significantly faster than I had predicted.

Interdepartmental Partnerships

Through discussions with the Head of Technical Services, one thing we quickly identified was that Cataloging staff were performing some patron outreach functions that didn't necessarily fit well within the scope of their work. Subject librarians would purchase items knowing that a specific patron would use them, and so an unofficial hold was indicated for the item. After Cataloging staff completed the item's processing, they then communicated with the patron to arrange pickup of the book. This stood out starkly as an activity that was not a good use of a cataloger's time and was largely duplicative of Access Services procedures already in place to handle patron holds. We collaborated to modify this workflow and assign the notification responsibilities to the trained customer service specialists in Access Services.

Another issue that came out in discussions with Technical Services was link-checking. The need constantly arose to be testing ebook and online journal links—either spot-checking or systematically testing, depending on the need. The task was time-consuming, but not difficult to learn or perform. In my mind, helping to ensure access to digital resources in this way was a good fit with the mission my department had defined. It also represented a large task composed of small “chunks,” that is, spreadsheet rows, making it a good activity to perform at a service desk, because it was easy to be interrupted between those small chunks. All Access Services staff were trained, and this project became especially valuable as we transitioned to telecommuting in 2020 during the COVID-19 pandemic. Access Services staff helped to check tens of thousands of links, and I faced little concern about keeping my staff employed productively.

Fruitful engagement has been made with the Reference department as well. Historically our library had separate Circulation and Reference desks up until the unveiling of a new shared desk in January 2018. Employees from both public service operations now shared a space but hesitated to share duties. This hesitation was fed by anxiety over intruding on another department's “turf,” combined with entrenched notions of what one is either permitted to do or capable of doing. We undertook bidirectional cross-training: we wanted Research & Instruction Librarians working reference to understand the basics of circulation policies and checkout procedures, and Access Services staff to feel more confident in their knowledge of directing students to and demonstrating core search tools like the discovery layer. We still maintain distinctions about the depth of research questions that should be referred to professional librarians, but we want to empower staff to handle more informational queries about online resources. Likewise, having the opportunity to cross-train others in their circulation policies and procedures has further empowered them to recognize that they already do important work and retain a vast mental warehouse of information about the library and the campus.

Finally, the Digital Resources department provided another opportunity for extending our skills and services in new directions. This department manages digitization, metadata, and the institutional repository, including the electronic theses and dissertations system, but it is a small team; historically it was only one librarian with one student worker, though it has grown

moderately to now also include two paraprofessional staff members. The backlog of possible digitization and metadata work alone creates a unique supply of low urgency, long-term projects: perfect for Access Services staff to set down during busy times of year and pick up when things are slow. Staff have received training for and contributed to projects ranging from transcription of oral history interview audio files to data entry of basic metadata from print theses and dissertations to support retrospective digitization and inclusion in the dark archives.

A New Twist

At the tail end of 2018, a new twist was introduced with an unexpected vacancy in Head of Interlibrary Services position. Although Interlibrary Loan (ILL) is already part of Access Services in some libraries, historically here it was its own independent department comprised of three full-time staff and seven students. ILL staff were also responsible for running the Copy Services room, and student workers assisted with both ILL pulling and scanning as well as patron copying, faxing, and so forth. Without its own department head, Interlibrary Services fell under my direction, first temporarily and finally permanently.

Integrating the Access and Interlibrary Services departments meant overcoming some hurdles of different personalities and differing perceptions of our mission, vision, and established expectations, but it has also created new opportunities to rethink our approaches to work. Following a staff retirement, we re-envisioned a position which now reports through the ILL staff supervisor and focuses on ILL Borrowing but is also cross-trained in Circulation and assists with evening desk coverage at the Service Desk. This provides additional support for coverage of public service desks while also linking that person to meaningful work outside of the desk. Furthermore, because the position works an evening shift to assist at Circulation, the staff member is able to provide supervisory support to student workers the evening shift in the Copy Room, whereas that support used to end at 5pm. This also enables ILL to respond sooner to some after-hours requests which would otherwise not be received until the next day. In short, this split function supports both sides of the department in new ways and helps us to expand our ideas of what services we can provide and when.

Assessing Success

Considering how to assess the success of new initiatives is always a challenge, but an essential step in the process. Regular check-ins with supervisors in other departments keep me apprised of my staff members' progress on external projects and any issues or concerns that may have arisen so that I can stay abreast of the situation if a specific project were not proving to be a good fit with one employee, and to determine whether we should we try an alternate approach to the work, train a different staff member to help, or rethink the project's suitability for support by Access Services. We keep tabs on the quantity of work completed in a given timeframe, the quality and accuracy of the work submitted, how effectively the staff member collaborates with team members in the other department, and any feedback shared by department members, patrons, or other stakeholders outside the library.

However, regular check-ins with my staff members have proven to be equally important as updates from other supervisors. How do they feel about the external projects they are

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supporting? Are they finding it difficult to integrate that work with their daily rounds on and off the public services desk? Are they feeling that the work is not compatible with their skillset? Can we secure additional professional development opportunities for them, or modify their involvement with the project to make it more successful, or should we rethink our support? While it is critical to know whether we are satisfying the other library departments that we are serving, it is also critical to know that doing so is not undermining morale or our ability to effectively perform our traditional core functions. So far, our support of interdepartmental projects has seen natural fluctuations with staff attrition and individual projects reaching their conclusions, but otherwise feedback and assessment have been positive, and only in one instance has a staff member asked to give up an interdepartmental project due to concerns of workload quantity.

Looking Forward

I don't know what further change the future will bring, especially as academic libraries continue to adapt to the increasingly virtual nature of services during and after COVID-19. But, as practices continue to change, we must continue to seek new ways of functioning that are tied, not to traditional concepts of Access Services, but to the core mission of the library itself. I believe what we find, ultimately, is that Access Services personnel are adaptable, teachable, and characterized by a drive to help actualize the library's mission where and how they can. If we can reimagine where those opportunities might exist, beyond just the traditional circulation model, our personnel will rise to the challenge and make new accomplishments possible.